

As Seen In... *Forbes*, October 27, 2008

Promotion

# Kansas

## Financial Profile

Whatever your short-term or long-term goals, this Kansas financial expert is prepared to get your money on the right track and keep it moving forward.



Featured Firm

**Paragon Capital Management**

[www.paragoncap.com](http://www.paragoncap.com)

## Customized Strategies for High-Net-Worth Investors

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## Paragon Capital Management, LLC

Lately, investing in the stock market has been a little like playing Whac-A-Mole™. After the recent subprime lending crisis, the government takeover of at least one major bank and rumors of more bank takeovers, combined with the near-collapse of several other financial institutions, many investors wait nervously, hammer in hand, wondering where the next problem will pop up. Craig Novorr, principal at Paragon Capital Management, advises clients to relax and lay the hammer down.

"We focus on the long term," says Novorr. "Markets have been like this in the past, and they always come back. Being patient and staying in the market is better than getting in and out. We try to get people to let us bear the stress."

From its headquarters in Overland Park, Kansas, Paragon Capital Management specializes in wealth accumulation and asset management for high-net-worth individuals and families throughout the United States. As an independent, fee-only firm, Paragon is free to recommend investments that are right for the client, not for the advisor.

"A lot of firms will sell all your assets and put you into their model," explains Howard Jacobson, Paragon's founder, president and CEO. "We might have stocks that we recommend, but if you have tax issues or inherited assets that you don't want to sell, we can work around that. We customize the portfolio for each client."

Using a proprietary evaluation system, Paragon searches for undervalued companies with high growth prospects in which to invest. The firm's investment advisors then design a portfolio of approximately 25 to 30 carefully selected stocks that are expected to outperform the market. Indeed, even during market downturns, clients have fared well, as Paragon's equity investments have consistently outperformed the S&P 500.

It's no surprise the overwhelming majority of Paragon's business has come from referrals by satisfied clients. It is also one reason why Charles Schwab & Company, Inc. approved Paragon Capital Management as one of the few wealth management firms nationwide to which it refers its own clients who are seeking professional advice.



**Principals of Paragon Capital Management**  
left to right: Ward Williams, Elizabeth McLeod, Craig Novorr,  
Ethel Davis & Howard Jacobson

"We have five principals who manage money and deal directly with clients," Novorr says. "They were hand picked because they wanted to be at a firm where they could deliver a high level of service by keeping a low client-to-professional ratio."

Paragon Capital Management was named one of the Best Personal Wealth Managers in Kansas City in both 2007 and 2008, by *KC Magazine*. Founded in 1998, the collective experience of the firm's investment professionals totals well over 100 years. Jacobson has been in the investment business since 1963, and his firm now serves third and fourth generations of some of his earliest clients.

"I love helping people achieve their financial goals," he says. "I'm proud that our clients recognize our service is second to none."

- Stocks
- Exchange Traded Funds
- Municipal Bonds
- Money Market Funds
- Taxable Bonds

**Best Personal Wealth Managers in  
Kansas City, 2007 & 2008**

— *KC Magazine*

**PARAGON CAPITAL MANAGEMENT, LLC**

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